Credit Transfer Institutional Grants (CTIG)

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Purpose

- Provide an overview of the Credit Transfer Institution Grant (CTIG) within the broader CT initiative
- Outline eligibility criteria
- Outline the CTIG review process
- Explain Ministry's approval criteria for reports
- Provide tips to common issues
- Explain work underway by ONCAT that links with CTIGs

Credit Transfer Framework

A comprehensive and consistently applied credit transfer system that facilitates student mobility, by assisting students to move between publicly funded postsecondary institutions without repeating prior, relevant learning

Vision

Improved Transfer Pathways + **Transparent and Accessible Information** + **Student Success**

Objectives

Improved Transfer Pathways	Transparent and Accessible Information	Student Success
Time/cost savings for students	Students aware of all transfer options	Less time to graduate/ enter labour market
More system-wide pathways	Clear articulation of transfer policies	Students have academic success after transfer
Reduced barriers to transfer	Policies/practices support transparency	Students have positive transfer experience
Institutional Collaboration		Prior relevant learning is recognized

Strategies

Improved Transfer Pathways	Transparent and Accessible Information	Student Success
ONCAT		Track/Report Data
Innovation Fund	ONTransfer	Innovation Fund Research
Institutional Grants – pathways	Institutional Grants – information	Institutional Grants – student supports/data
Course Equivalencies		

Institutional Grant: Eligible Activities

- Short-term funding formula, funding base and eligible funding activities were developed in consultation with the Credit Transfer Steering Committee and Technical Working Group

- Activities are organized to support three goals

- **Goal/Activity 1: Improved Transfer Pathways** (previously Activity 2: Pathway Projects)
  - All transfer pathways (apprenticeship-college-university)
  - Projects that follow transfer model framework;
    - Multilateral approach (include access to as many students as possible)
    - Expanding bilateral pathways to multilateral
  - Bilateral approach where no provincial standard exists, unique program offerings or programs that offer the only high affinity programs in the system
  - Regional needs (high demand for regional transfer)
  - Innovative pathways that test models outside those funded by ONCAT that could be replicated on a province-wide basis
  - Development of (non-provincial) bridging programs
  - Renewal of existing pathways
    - Reviewing/updating transfer pathways to align with curriculum/program standard updates
    - Provide new level of specificity on credit transfer; should enable readiness for uploading to ONTransfer

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Eligible Activities

- **Goal/Activity 2: Transparent and Accessible Information** (previously Activity 1: Data Collection and Reporting and Activity 3: Transfer Facilitation Activities)
  - Activity associated with implementing data system changes that allow for better tracking of transfer students between institutions that complements ONCAT activity
  - Online transfer assessments or automating transfer request processes
  - Preparing and posting pathway information for the ONTransfer website
  - Print and web-based credit transfer materials to be used for promotion and marketing and/or to provide information to students on how to obtain credit recognition; should make reference to ONTransfer.ca for detailed information about specific pathways
    - Collaborative where possible

- **Goal/Activity 3: Student Success** (previously Activity 1: Data Collection and Reporting and Activity 3: Transfer Facilitation Activities and Student Support Services)
  - Services and supports that facilitate student transition between institutions
    - Transcript assessment
    - Transfer student support services including transfer counselling and mediation
    - Orientation programs
    - Classroom space to support transfer activity
  - Research projects that inform how to better support transfer students within institution

Question: Are there activities not listed as eligible for funding that you think should be, which would support the identified goals?

Activities Out of Scope

- General
  - Recognition of non-credit courses and informal learning
  - Recognition of credit courses earned at private institutions and institutions in other jurisdictions
  - Major investments in capital and equipment
  - Activities that overlap with provincial initiatives or duplicate work of the ONCAT

- Goal/Activity 1: Improved Transfer Pathways
  - Pathways that duplicate work underway or developed by ONCAT or renewal of pathways that overlap with provincial projects
    - Business cases can be provided and ONCAT support must be obtained if institutions wish to propose work in a discipline being undertaken as a provincial project
  - Pathways where program standards are in the process of being updated
  - Pathways with out-of-province, out of country or private institutions
  - Collaborative programs
  - Prior Learning Assessment and Recognition
  - Internal transfer

Activities Out of Scope

- Goal/Activity 2: Transparent and Accessible Information
  - Any institutional system changes that duplicate work underway by ONCAT to implement accountability system
  - Any institutional capacity that duplicates existing and planned functionality of ONTransfer (e.g. detailed on-line descriptive information on transfer pathways, pathway search capacity, course equivalency information)
  - Changes to institutions' student information systems and link with ONCAT course equivalency database

- Goal/Activity 3: Student Success
  - Internal student tracking system for all students (portion attributable to credit transfer students is eligible e.g. degree audit system that would benefit credit transfer students)
  - Staff time that supports all students (e.g. registrar time should only be attributable to transfer student activity)
  - Research projects that duplicate ONCAT projects

CTIG Review and Approval Process

- Two-year Transfer Payment Agreements

- Year 1: April 1, 2013 to March 31, 2014
    - Payments are made upon approval of:
        - Signed 2-year TPA and 2012-13 Final Report
        - 2013-14 Annual Plan
        - 2013-14 Status Update

- Year 2: April 1, 2014 to March 31, 2015:
    - Payments are made upon approval of:
        - 2013-14 Final Report and Signed Amending Agreement
        - 2014-15 Annual Plan
        - 2014-15 Status Update

- Institutional allocations must be used for activities/expenditures in the fiscal year for which the allocation is provided (e.g. 2013-14 institutional allocations must be used for activities/expenditures between April 1, 2013 and March 31, 2014)

CTIG Approval Criteria

Annual Plan
- Total institutional allocation fully budgeted towards eligible activities
  - 10% of institutional allocation must be applied toward one-time activities/expenditures
- Clear description of activities/expenditures, including:
  - Full description of project/s, purpose of activities/expenditures and specifically how they are related to credit transfer
  - Clear demonstration that activities fall within eligibility guidelines and do not duplicate projects funded through ONCAT
  - Where projects appear to overlap with ONCAT projects, institutions must discuss proposal ideas with ONCAT and include a statement that ONCAT has been consulted. Projects must explain in sufficient detail how this project complements relevant ONCAT projects.
  - Clearly defined deliverables
  - Completion of specific deliverables/milestones within the fiscal year
    - Only propose phase/deliverable for completion within fiscal year if project will span several years
- For pathway development include:
  - Sending program/receiving program
  - Sending institutions/receiving institutions
  - Full description of deliverables/milestones and phases of work (e.g .discussion with partnering institutions, curriculum review/mapping, revise existing agreement, develop new agreement/policy etc.)
  - Business plan for bilateral, development of pathways in the same disciplines explored through provincial projects along with statement that ONCAT has been consulted

CTIG Approval Criteria

Status Update
- Affirmation that activities/expenditures are on-track for:
  - Completion by end of the fiscal year
  - Full expenditure of original budget
- If an institution indicates that activities and expenditures may not be completed by the end of the fiscal year as planned, proposals for alternative activities/expenditures may be submitted for Ministry approval

Final Report
- Confirmation regarding status of completion of activities and actual expenditure by end of the fiscal year (March 31)
- 3 week turnaround time from the time the transfer payment is submitted for payment to the time payment is made
- Allow 1-2 weeks for preparation of transfer payment and internal approvals

Annual Plan Examples

	Insufficient Detail To Approve	Sufficient detail to Approve
Transparent and Accessible Information	"A system analyst will be dedicated to Credit Transfer data collection, planning, and reporting activities".	"Design and implement an online submission process to capture transfer requests and any associated supporting documentation. This will include development and project management. This will create a more efficient environment for applicants and internal processing and storage. (Completion: March 30, 2013)"
Improved Pathways	"Pursue new agreements with universities A, B, and C. Program areas include Music, Computer Systems Technology, Business, Health Sciences, and Environmental Sustainability."	Complete curriculum review by March 31, 2013 to develop multilateral pathway between specific-sending-program-name at Colleges X and Y to specific-receiving-program-name at University A. Based on discussion with ONCAT, this program does not overlap with any projects currently under development or planned at ONCAT.
Transparent and Accessible Information	"Conduct site visits to three near north and northern colleges offering certificates A to introduce University X's program B, and transfer credit options, for student interested in pursuing this field at the degree level."	"Earlier access to credit transfer information and decisions – stage two: Create tools and processes to provide details on credit transfer eligibility at time of admission so that applicants can make more informed decisions about the University's offer of admission. Completion: March 2013."

Accountability Framework

- As part of planning for the accountability framework, all 44 institutions will be asked to complete and submit a Credit Transfer Data Availability report to ONCAT, including:
  - Availability of data for the 2011-2012 tombstone data elements, including:
    - Total number of credit transfer students
    - Previous institution attended
    - Program admitted to at receiving institution
    - Previous program attended
    - Level of completion of previous program
    - Total credits transferred

  - Assessment of what is required to create/provide any data elements that are not available at present

  - Assessment of costs required to develop all of the required data to populate the draft Credit Transfer Accountability Framework

ONCAT Pilot Project to Populate the Accountability Framework

- During 2013 – 2014, ONCAT is coordinating a pilot project with approximately 10 institutions (universities and colleges) to develop the data collection strategies, system changes, and information analyses used to inform implementation of the Accountability Framework.

- 10 institutions have been selected based on a variety of criteria, including:
  - Maturity of existing IT systems, skills, and workforce availability
  - Volume of credit transfer applicants and registrants
  - Similarity of existing IT systems and inter-operability with an ancillary, third party database system which will be developed for purposes of testing the model's data collection, analytics, and reporting processes
  - Level of interest in advancing the credit transfer agenda

- Through the 10 institutions selected, preliminary insights on approximately 40% - 50% of the total credit transfer population will be available within the 2013-2014 cycle. These insights will be used to refine and inform the details of the credit transfer indicators and the Accountability Framework.

- MTCU and the 10 educational institutions will invest in an ancillary system that will allow for an aggregation of credit transfer data / information in a third party environment.

Accountability Framework

- A fully mature Credit Transfer Accountability Framework will include:
  - Policy guidelines with clear priorities, direction and expectations
  - Performance indicators that measure progress against clearly articulated goals and vision
  - Established baselines
  - The ability to link funding to measurable credit transfer activity
  - The ability to evaluate long-term success of the credit transfer initiative

- Planning for an accountability framework has included a progressive set of activities:
  - Development of proposed indicators
  - Stakeholder consultation
  - Gap analysis
  - Review and feedback
  - Development of an implementation plan

Accountability Framework

- The long-term Credit Transfer Accountability Framework is intended to track, support and enable Ontario's new student-centred credit transfer initiative.

- The Credit Transfer Accountability Framework and proposed indicators are designed to track progress towards the goals of the credit transfer initiative and will measure the effectiveness of the credit transfer initiative for all postsecondary transfer directions:
    - University to College
    - University to University
    - College to College
    - College to University
    - College to Apprenticeship
    - Apprenticeship to College

- A phased approach, is anticipated. At maturation the framework will include data collection, research and analysis, centralized data systems and public reporting.

- The implementation plan will be informed by MTCU and sector data collection improvements, including revisions to the enrolment audit (i.e., PFIS-CSER and USER) and the Ontario Education Number implementation (OEN).

Credit Transfer Innovation Fund

- Pathway projects currently under development include:
  - 12 college diploma/advanced diploma to university degree projects
  - One project to develop the bridge from college business accounting programs to university accounting degree programs into an on-line format
  - Six projects to develop specially designed degree programs for low affinity college diploma/advanced diploma graduates (B2 projects)
  - Seven apprenticeship-diploma-apprenticeship projects
  - 16 college to college diploma and advanced diploma projects
  - 14 college diploma/advanced diploma to college degree projects
  - Course-to-Course Equivalency to facilitate the transfer of College General Education Courses
  - Course-to-Course Equivalency to facilitate the transfer of specific course credits

- In addition, the Innovation Fund is supporting:
  - 24 research projects
  - Course-to-course equivalency database
  - Specially designed Degree Completion Programs

Question for Discussion:
Is there anything else we should we fund through the Innovation Fund?

Next Steps

- TCU will be conducting a survey to improve administrative efficiency and clarity on the CTIG and guidelines for 2013-14 and 2014-15 grants
    - To be issued in early-mid March
- Based on feedback from this session and the survey, Guidelines and templates will be revised
- TCU is in the progress of closing out 2012-13 grants; Status Updates are currently under review
- 2013-14 and notional 2014-15 allocations to be determined in March/April
- New 2013-14 and 2014-15 Agreements to be issued to institutions in May 2013

Questions

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